



## **Office of Information Technology Services**

### **Project Portfolio Management Tool**

#### **Roles and Responsibilities**

# Table of Contents

1	Document History .....	2
2	Purpose .....	3
3	Roles and Responsibilities Matrix.....	4
4	Roles .....	5
4.1	Roles in the PPM Tool:.....	5
4.2	Project Manager/Contributor .....	5
4.3	Agency Reviewer .....	6
4.4	Agency Approver.....	7
4.5	Statewide Reviewer.....	8
4.6	Statewide Approver .....	9
4.7	State CIO .....	10

## 1 Document History

### 1. Revision History

Revision #	Revision Date	Description of Change	Author
1.0	8/01/2005	Initial Document	J. Tulenko
1.1	10/28/2005	Merge Roles and Responsibility Matrix into this document	J. Tulenko
1.2	11/23/2005	Document History and Table of Contents same page; various minor grammatical corrections	C. Richards

## **2 Purpose**

This document has been created to assist users of the Project Portfolio Management tool to understand the various roles in the tool and associated responsibilities.

### 3 Roles and Responsibilities Matrix

<b>Roles / Functions</b>	Contributor	Agency Reviewer	Agency Approver	State Reviewer	State Approver	State CIO (Final approver)
Ability to <b>create</b> a new project	Yes	No	No	No	No	No
Ability to <b>edit</b> project data	Yes, entire project	Yes, but limited to certain TABS within the tool (Issues & Risks and Document Management Tabs)	Yes, but limited to certain TABS within the tool (Issues & Risks and Document Management Tabs)	Yes, but limited to certain TABS within the tool (Issues & Risks and Document Management Tabs)	Yes, but limited to certain TABS within the tool (Issues & Risks and Document Management Tabs)	Yes, but limited to certain TABS within the tool (Issues & Risks and Document Management Tabs)
Ability to <b>delete</b> project data	Yes—all contributors can add or delete	No	No	No	No	No
Ability to <b>view all projects</b> within an agency	Note: only if assigned by practice to all agency projects	Yes	Yes	Yes	Yes	Yes
<b>Required to act</b> before project moves forward in workflow	Yes—all contributors must approve before the project can move forward.	No	Yes	No	Yes	Yes
Ability to <b>enter comments</b> during workflow approval	Yes	No, but may be included in a future release	Yes	No, but may be included in a future release	Yes	Yes
Will be <b>notified</b> when a project is moved to the appropriate approval gate	No, but contributors will be notified after State CIO approval or if project is rejected during approval process	Yes	Yes	Yes	Yes	Yes

## 4 Roles

### 4.1 Roles in the PPM Tool:

- [Project Manager/Contributor](#)
- [Agency Reviewer](#)
- [Agency Approver](#)
- [Statewide Reviewer](#)
- [Statewide Approver](#)
- [State CIO](#)

### 4.2 Project Manager/Contributor

#### Primary Responsibilities in the tool:

- **Project Status Reporting**
  - Provide Project Status Reporting for ongoing projects for which you are responsible (monthly or quarterly)
- **Project Approvals**
  - Submit Project Approvals to your agency's approvers and reviewers for new projects in your agency as well as approvals for the next phase of a project (refer to workflow in the tool)

## 4.3 Agency Reviewer

### Primary Responsibilities in the tool:

- **Project Approval**
  - When a Project Approval (for a new project or new phase of a project) is signed off from a project manager in your agency, you will receive notification (via email) that it is available for your **review**. Your responsibility will be to review the project. If you have any concerns with the project, you should discuss them with the project manager or one of the agency approvers, since your explicit approval is not required in the tool before the project can be sent on for statewide approval. The review process for an agency is left up to the agency in terms of how much time they will spend internally before the agency approvers approve a project and send it on to the state for statewide review and approval.
- **Project Status Reporting**
  - Optionally, your agency may want your input on project status reporting for some or all of the projects in your agency. If you would like to be notified when a project status report is ready for your **review**, you can subscribe to an alert when the project “Project Status Report Step” value is set to “agency review”. When the project manager sets the status to that value, you will receive an email notifying you and giving you the opportunity to review the project status report. When you are finished with your review, have the project manager/contributor move the status to “QA Review” (to kick off the review of the status by the EPMO QA staff).
- **Project Status Reviewing**
  - At any point in time, you can **review** the overall status of your agency projects at a high level by clicking on the “dashboard” button at the top right hand part of the tool window where you can see the latest indicators for each of your projects, or in detail for a specific project by clicking on a specific project to “view” it.

## 4.4 Agency Approver

### Primary Responsibilities in the tool:

- **Project Approval**
  - When a Project Approval (for a new project or new phase of a project) is signed off from a project manager in your agency, you will receive notification (via email) that it is available for your **approval**. Your responsibility will be to review the project and determine if you want to approve or reject the project (by clicking on the “Workflow” button on the Project Info tab, and approving/rejecting the project at the bottom of that screen). If you **and all** other agency approvers “approve” the project, it will be sent electronically to the state approvers for their review. After all approvers submit their approval/rejection, if any of the agency approvers “reject” the project, it will be returned to the prior state in the workflow and the project manager/contributor will be notified that further action is required on their part before they re-submit the project for agency approval. You will also be able to enter comments when approving or rejecting (which will be forwarded on to the Project Manager/Contributor).
- **Project Status Reporting**
  - Optionally, your agency may want your input on project status reporting for some or all of the projects in your agency. If you would like to be notified when a project status report is ready for your **review**, you can subscribe to an alert when the project “Project Status Report Step” value is set to “agency review”. When the project manager sets the status to that value, you will receive an email notifying you and giving you the opportunity to review the project status report. When you are finished with your review, have the project manager/contributor move the status to “QA Review” (to kick off the review of the status by the EPMO QA staff).
- **Project Status Reviewing**
  - At any point in time, you can **review** the overall status of your agency projects at a high level by clicking on the “dashboard” button at the top right hand part of the tool window where you can see the latest indicators for each of your projects, or in detail for a specific project by clicking on a specific project to “view” it.

## 4.5 Statewide Reviewer

### Primary Responsibilities in the tool:

- **Project Approval**
  - When a Project Approval (for a new project or new phase of a project) is signed off from the agency approvers in any agency, you will receive notification (via email) that it is available for your **review**. Your responsibility will be to review the project. If you have any concerns with the project, you should discuss them with EPMO Office, since your explicit approval is not required in the tool before the project can be sent on for statewide approval.
- **Project Status Reviewing**
  - At any point in time, you can **review** the overall status of all projects at a high level by clicking on the “dashboard” button at the top right hand part of the tool window where you can see the latest indicators for each of projects, or in detail for a specific project by clicking on a specific project to “view” it.



## 4.6 Statewide Approver

### Primary Responsibilities in the tool:

- **Project Approval**
  - When a Project Approval (for a new project or new phase of a project) is signed off from the agency approvers in any agency, you will receive notification (via email) that it is available for your **approval**. Your responsibility will be to review the project and determine if you want to approve or reject the project (by clicking on the “Workflow” button on the Project Info tab, and approving/rejecting the project at the bottom of that screen). If you and all other statewide approvers “approve” the project, it will be sent on to the State CIO for his review and approval. After all approvers submit their approval/rejection, if any of the statewide approvers “reject” the project, it will be returned to the prior state in the workflow and the project manager/contributor will be notified that further action is required on their part before they re-submit the project for agency and statewide approval. You will also be able to enter comments when approving or rejecting (which will be forwarded on to the Project Manager/Contributor).
- **Project Status Reviewing**
  - At any point in time, you can **review** the overall status of all projects at a high level by clicking on the “dashboard” button at the top right hand part of the tool window where you can see the latest indicators for each of projects or in detail for a specific project by clicking on a specific project to “view” it.

## 4.7 State CIO

### Primary Responsibilities in the tool:

- **Project Approval**
  - Once a project is approved by the Statewide Approvers, you will receive notification (via email) that it is available for your **approval**. Your responsibility will be to review the project and determine if you want to approve or reject the project (by clicking on the “Workflow” button on the Project Info tab, and approving/rejecting the project at the bottom of that screen). If you “approve” the project, it will be moved forward to the next phase of the workflow and the budget costs for that phase will be considered approved. If you “reject” the project, it will be returned to the prior state in the workflow and the project manager/contributor will be notified that further action is required on their part before they re-submit the project for agency and statewide approval. You will also be able to enter comments when approving or rejecting (which will be forwarded on to the Project Manager/Contributor).
- **Project Status Reviewing**
  - At any point in time, you can **review** the overall status of all projects at a high level by clicking on the “dashboard” button at the top right hand part of the tool window where you can see the latest indicators for each of projects or in detail for a specific project by clicking on a specific project to “view” it.